

NC eProcurement

Procurement Exceptions (Non-IT)

If circumstances arise where a user needs to petition P&C for a Procurement Exception, that request and approval process is built into the Sourcing Project workflow. Users will indicate their intent to request an Exception in the **'Special Circumstances'** field on the **'Create Sourcing Project'** page, which triggers additional tasks and documents to be added to the Sourcing Project.

I. Requesting a Procurement Exception

- While completing the **'Create Sourcing Project'** page after initiating a Sourcing Project, the user should click the dropdown arrow in the **'Special Circumstances'** field and select any of the Exception types that apply: **'Procurement Exception – Extended Contract Term,' 'Procurement Exception – Waiver of Competition,' 'Procurement Exception – Brand Specific Request,'** or **'Special Delegation.'**

Notes:

- 'Special Delegation'** eliminates the need for P&C approval.
- If no options display in the dropdown menu immediately, click **'Search more.'**

The screenshot shows the 'Create Sourcing Project' page. The 'Special Circumstances' field is highlighted with a dashed circle. A dropdown menu is open, showing options: 'Special Delegation', 'Procurement Exception - Extended Contract Term', 'Procurement Exception - Waiver of Competition', and 'Procurement Exception - Brand Specific Request'. A yellow callout box points to the dropdown arrow with the text: 'Click the arrow next to the **'Special Circumstances'** field and select an Exception type from the dropdown.'

II. Waiver of Competition Exceptions

Users who select **'Special Circumstance'** of **'Procurement Exception – Waiver of Competition'** will not have to answer the template question regarding the type of solicitation, as an RFQ will be automatically assigned. Users will also see an additional task in **Phase 04** instructing them to **'Populate Waiver of Competition Exception Template.'** Once this is complete, they should replace that template in the **'Solicitation Document'** folder for P&C to review during the **'Gain P&C Approval of Sourcing Event'** task. Because the solicitation will not be posted publicly, the Sourcing Event can be sent directly to the selected vendor.

- On a Sourcing Project where a Waiver of Competition Exception has been requested, only one template question will display at the bottom of the screen. There is no need to indicate that an RFQ will be created.

The screenshot shows the 'Create Sourcing Project' page. The 'Special Circumstances' field is highlighted with a dashed circle. A dropdown menu is open, showing options: 'Special Delegation', 'Procurement Exception - Extended Contract Term', 'Procurement Exception - Waiver of Competition', and 'Procurement Exception - Brand Specific Request'. A yellow callout box points to the dropdown arrow with the text: 'There is only one template question when a Waiver of Competition Exception is selected.'

Below the dropdown menu, the 'Select a template' section is visible. The 'State of North Carolina Sourcing Process' template is selected. A question is displayed: 'The default number of Sourcing Event envelopes is 1, which is standard for One-Step solicitations. Will this be a Two-Step solicitation (2 envelopes)?'. The answer is 'No'. A 'Create' button is visible at the bottom right.

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STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

- When the user gets to **Phase 04** on the **'Tasks'** tab, they will see an additional task instructing them to **'Populate Waiver of Competition Exception Template.'** The task is linked to the **'Procurement Exception – Waiver of Competition Template'** in the **'Solicitation Document'** folder.

03 - DEVELOP SOURCING STRATEGY ▾ Project Owner Not Started

04 - DEVELOP SOURCING EVENT ▾ Project Owner Not Started

- Populate Solicitation Document Template ▾ Solicitation Document ▾ Project Owner Not Started
- Build Sourcing Event Rules and Content ▾
- Populate Waiver of Competition Exception Template ▾
- Gain P&C Approval of Sourcing Event ▾ Sourcing Event ▾ Project Owner Not Started
- Create Supplier Research Posting and Publish Sourcing Event ▾ Sourcing Event ▾ Project Owner Not Started

05 - CONDUCT SOURCING EVENT ▾ Project Owner Not Started

- Navigate to the **'Documents'** tab, click the blue triangle to the left of the **'Solicitation Document'** folder, click on the **'Procurement Exception – Waiver of Competition Template'** document, and select **'Download'** from the dropdown to download the template.

Name	Action	Owner	Status
Solicitation Document	Download		
Solicitation Document	View Details		
Solicitation Document	Edit Attributes		
Solicitation Document	Copy		
Solicitation Document	Move		
Procurement Checklist Template ▾		Project Owner	Not Edited
Procurement Exception – Waiver of Competition Template ▾		Project Owner	Not Edited

- When the template has been filled out, click back into the **'Solicitation Document'** folder and click on the template document again. Select **'Replace Document'** from the dropdown to load a completed version for P&C to consider along with the RFQ document, Procurement Checklist, and Event in the **'Gain P&C Approval of Sourcing Event'** task. P&C will communicate their decision during the Sourcing Event approval process.

Name	Action	Owner	Status
Solicitation Document	Download		
Solicitation Document	View Details		
Solicitation Document	Edit Attributes		
Solicitation Document	Copy		
Solicitation Document	Move		
Procurement Checklist Template ▾		Project Owner	
Procurement Exception – Waiver of Competition Template ▾		Project Owner	
Replace Document		Project Owner	

- After all approvals have been granted by P&C and the Sourcing Event **'Rules'** and **'Content'** have been finalized, the user should click onto the Event's **'Suppliers'** section and click the **'Proceed to Invite Participants'** link at the top

Invite participants to participate in the event. Flag incumbent participants at the event level and the incumbency flag will be set for each lot. [More](#)

If you would like to proceed to the invite supplier step, [Proceed To Invite Participants](#)

Discover New Suppliers
Find additional suppliers for your project in as little as two days with Ariba Discovery!
To get started, create a posting below. Posting takes 5 minutes and it's free! [Learn More](#)

Create a Supplier Research Posting

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- On the subsequent **'Invited Participants'** page, click the **'Invite Participants'** button.

Invite participants to participate in the event. Flag incumbent participants at the event level and the incumbency flag will be set for each lot, enabling you to clearly see how

Invited Participants

Organization Name Contact Name No Incumbency

Invite Participants Excel Import Create Supplier Research Posting

- Using the **'Search Filter,'** find the name of a vendor to invite, put a check to the left of their name, and click **'OK'** to invite them to respond. Clicking the **'+'** button will add additional search fields.

Note: Only vendors actively registered in the NC electronic Vendor Portal (eVP) can be selected.

Search Filter

Search using Name, ID, or any other term

Contact Name state

Search Results

Organization Name

NC Test Vendor

STATE OF NORTH CAROLINA - Test Supplier

NC State Supplier

ncstatesupplier@gmail.com

Reset Search

OK Cancel

- Invited vendors will display on the **'Invited Participants'** page.

Notes:

- A Discovery Posting is still required when directly inviting a vendor. After selecting the vendor, click back on **'Create Supplier Research Posting'** and fill out and publish the Discovery page.
- Put "Do Not Respond" as the **'Posting Title'**.
- Set **'Response Deadline'** to the same day, and the posting should expire in 30 minutes.
- There is no need to post the URL to IPS.

Invited Participants

Organization Name

NC Test Vendor

Remove Set/Clear Compare

Prev Next Exit

III. Extended Contract Term Exceptions

Users who select a ‘**Special Circumstance**’ of ‘**Procurement Exception – Extended Contract Term**’ will see two additional tasks in **Phase 04** instructing them to ‘**Populate Extended Contract Term Exception Template**’ and to ‘**Gain P&C Approval of Extended Contract Term Exception**’ before the Solicitation Document and Event is sent to P&C for review during the ‘**Gain P&C Approval of Sourcing Event**’ task.

1. On a Sourcing Project where an Extended Contract Term Exception has been requested, a ‘**Populate Extended Contract Term Exception Template**’ task will display in **Phase 04**. The task is linked to the ‘**Extended Contract Term Exception**’ folder on the ‘**Documents**’ tab.

Task	Category	Owner	Status
Populate Solicitation Document Template	Solicitation	Project Owner	Not Started
Build Sourcing Event Rules and Content	Sourcing	Project Owner	Not Started
Populate Extended Contract Term Exception Template	Extended Contract Term Exception	Project Owner	Not Started
Gain P&C Approval of Extended Contract Term Exception	Extended Contract Term Exception	Project Owner	Not Started
Gain P&C Approval of Sourcing Event	Sourcing Event	Project Owner	Not Started
Create Supplier Research Posting and Publish Sourcing Event	Sourcing Event	Project Owner	Not Started

2. Navigate to the ‘**Documents**’ tab, click the blue triangle to the left of the ‘**Extended Contract Term Exception**’ folder, click on the ‘**Procurement Exception – Extended Contract Term Template**’ document, and select ‘**Download**’ from the dropdown to download the template. Save the document locally, fill it out, and click back onto the document template when it is complete. Select ‘**Replace Document**’ from the dropdown to upload a completed version for P&C to consider.

Name	Action	Owner	Status
Procurement Exception - Extended Contract Term Template	Download	Project Owner	
Extended Contract Term Exception	Copy	Project Owner	
Extended Contract Term Template	Move	Project Owner	Not Edited
Extended Contract Term Template	Publish	Project Owner	
Extended Contract Term Template	Add to Quick Links	Project Owner	
Extended Contract Term Template	Lock	Project Owner	
Extended Contract Term Template	Create Shortcut	Project Owner	
Extended Contract Term Template	Replace Document	Project Owner	

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- When the template has been replaced, navigate back to the **'Tasks'** tab and click on the **'Gain P&C Approval of Extended Contract Term Exception'** task and select **'View Task Details'** from the dropdown. Specify a **'Due Date'**, add any additional comments, and click **'Submit.'**

Note: The approval flow for this Task will be automated. There is no need to insert a P&C Service Team into the approval flow.

- Once P&C approves the Exception request, the task will automatically update to **'Approved'** status and the user can proceed to the following **'Gain P&C Approval of Sourcing Event'** task.

	Populate Extended Contract Term Exception Template ▾	Extended Contract Term Exception ▾	Project Owner	Not Started
	Gain P&C Approval of Extended Contract Term Exception ▾	Extended Contract Term Exception ▾	classroomtraining49	Approved 03/30/2023
	Gain P&C Approval of Sourcing Event ▾	Sourcing Event ▾	Project Owner	Not Started

IV. Brand Specific Request Exceptions

Users who select a **'Special Circumstance'** of **'Procurement Exception – Brand Specific Request'** will see an additional task in **Phase 04** instructing them to **'Populate Brand Specific Exception Template.'** Once this is complete, they should replace that template in the **'Solicitation Document'** folder for P&C to review during the **'Gain P&C Approval of Sourcing Event'** task.

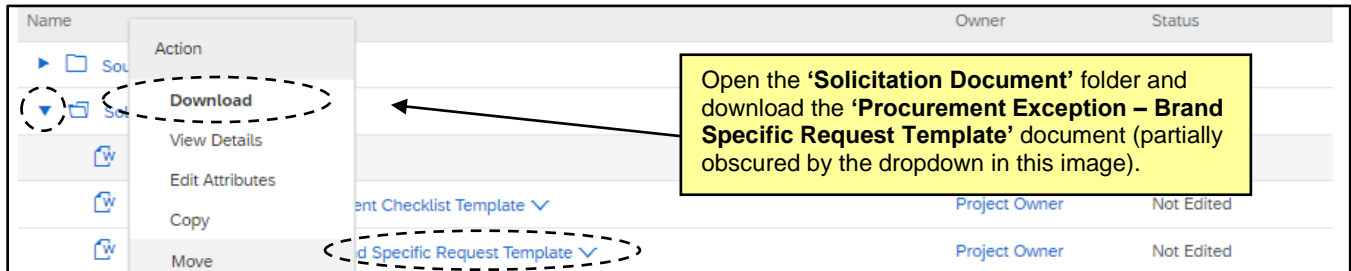
- On a Sourcing Project where a Brand Specific Request Exception has been requested, a **'Populate Brand Specific Request Exception Template'** task will display in **Phase 04**. The task is linked to a document template in the **'Solicitation Document'** folder.

03 - DEVELOP SOURCING STRATEGY ▾	Project Owner	Not Started
04 - DEVELOP SOURCING EVENT ▾	Project Owner	Not Started
Populate Solicitation Document Template ▾		
Build Sourcing Event Rules and Content ▾		
Populate Brand Specific Request Exception Template ▾		
Gain P&C Approval of Sourcing Event ▾	Sourcing Event ▾	Project Owner Not Started
Create Supplier Research Posting and Publish Sourcing Event ▾	Sourcing Event ▾	Project Owner Not Started
05 - CONDUCT SOURCING EVENT ▾	Project Owner	Not Started

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2. Navigate to the **'Documents'** tab, click the blue triangle to the left of the **'Solicitation Document'** folder, click on the **'Procurement Exception – Brand Specific Request Template'** document, and select **'Download'** from the dropdown to download the template.



3. When the template has been filled out, click back into the **'Solicitation Document'** folder and click on the template document again. Select **'Replace Document'** from the dropdown to load a completed version for P&C to consider along with the Solicitation Document and Event in the **'Gain P&C Approval of Sourcing Event'** task. P&C will communicate their decision during the Sourcing Event approval process.

